



Filing ID #10026923

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Jim Cooper
Status: Member
State/District: TN05

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2018
Filing Date: 06/12/2019

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Adams Properties, 33% Interest [RE]		\$500,001 - \$1,000,000	Partnership Income	\$1,001 - \$2,500	<input type="checkbox"/>
DESCRIPTION: Lots on Beach Dr., Gulfport MS; Residence on Bent Tree Circle, Pass Christian, MS; lot on Cat Island, MS; condo unit on Laurel Street in New Orleans, LA.					
Annuity ⇒ CREF Stock R3 [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Annuity ⇒ TIAA Traditional [EF]		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Brookfield Real Assets Income Fund Inc. (RA) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
City Holding Company (CHCO) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Coca-Cola Company (KO) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Comcast Corporation - Class A (CMCSA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Congressional Federal Credit Union Accounts [BA]		\$100,001 - \$250,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Cooper Brothers Land Co., 33% Interest [RE]		\$5,000,001 - \$25,000,000	Partnership Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
DESCRIPTION: Value of Asset reflects gross assets of which filer owns 33% share. See property descriptions under asset class "Cooper Bros Land Co". Income listed here is aggregate for all properties in the portfolio for 2018.					
Cooper Brothers Land Co. ⇒ Farm at 497 Shofner Bridge Road, 463 acres [RP]		\$250,001 - \$500,000	Rent	None	<input type="checkbox"/>
LOCATION: Shelbyville, TN, US DESCRIPTION: Income reflects filer's total income for all properties held in Cooper Bros. Land Co. Income for this specific property is only a portion of that aggregate amount.					
Cooper Brothers Land Co. ⇒ Farms: Tweedy and Floyd; Utley; Mueth and Brahm; Klondike (see description) [RP]		\$500,001 - \$1,000,000	Rent	None	<input type="checkbox"/>
LOCATION: Smith Mills, KY, US DESCRIPTION: Income reflects filer's total income for all properties held in Cooper Bros. Land Co. Income for this specific property is only a portion of that aggregate amount. Full asset description: Tweedy and Floyd, Hwy 266 (575 acres); Utley, Burbank Road (75 acres); Mueth and Brahm, Alzey-Uniontown Rd (270 acres); Klondike, Klondike Rd (453 acres)					
Cooper Brothers Land Co. ⇒ Field on Thompson Creek Road, 80 acres [RP]		\$1,001 - \$15,000	Rent	None	<input type="checkbox"/>
LOCATION: Shelbyville, TN, US DESCRIPTION: Income reflects filer's total income for all properties held in Cooper Bros. Land Co. Income for this specific property is only a portion of that aggregate amount.					
Cooper Brothers Land Co. ⇒ Lot 6A at 658 Grassmere Office Park, Trousdale Pike [RP]		\$1,000,001 - \$5,000,000	Rent	None	<input type="checkbox"/>
LOCATION: Nashville, TN, US DESCRIPTION: Income reflects filer's total income for all properties held in Cooper Bros. Land Co. Income for this specific property is only a portion of that aggregate amount.					
Cooper Brothers Land Co. ⇒ Lot at 410 Deery Street [RP]		\$1,001 - \$15,000	Rent	None	<input type="checkbox"/>
LOCATION: Shelbyville, TN, US DESCRIPTION: Income reflects filer's total income for all properties held in Cooper Bros. Land Co. Income for this specific property is only a portion of that aggregate amount.					
Cooper Brothers Land Co. ⇒ Lot on East Depot Street [RP]		\$1,001 - \$15,000	Rent	None	<input type="checkbox"/>
LOCATION: Shelbyville, TN, US DESCRIPTION: Income reflects filer's total income for all properties held in Cooper Bros. Land Co. Income for this specific property is only a portion of that aggregate amount.					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Cooper Brothers Land Co. ⇒ Lots at 319, 401, 409, and 414 East Lane Street [RP]		\$250,001 - \$500,000	Rent	None	<input type="checkbox"/>
LOCATION: Shelbyville, TN, US DESCRIPTION: Income reflects filer's total income for all properties held in Cooper Bros. Land Co. Income for this specific property is only a portion of that aggregate amount.					
Cooper Brothers Land Co. ⇒ Lots on 756 Madison Street [RP]		\$250,001 - \$500,000	Rent	None	<input type="checkbox"/>
LOCATION: Shelbyville, TN, US DESCRIPTION: Income reflects filer's total income for all properties held in Cooper Bros. Land Co. Income for this specific property is only a portion of that aggregate amount.					
DNP Select Income Fund (DNP) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Federated GNMA Trust [EF]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Contrafund (FCNTX) [EF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Growth & Income Fund (FGRIX) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Municipal Money Market [EF]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
General Electric Company (GE) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Hamilton Fairfax LLC, 33% Interest [OL]		\$100,001 - \$250,000	Partnership Income	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Nashville, TN, US DESCRIPTION: Apartment Building on Fairfax in Nashville, TN. Gross value of asset listed; filer owns 33% interest therein.					
Hancock Holding Company (HBHC) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Harpeth Green Properties, LLC, 7% Interest [OL]		\$50,001 - \$100,000	None		<input type="checkbox"/>
LOCATION: Brentwood, TN, US DESCRIPTION: Interest in Heritage Retirement Facilities LLC and Heritage Health Center LLC; interest in Undeveloped land in Brentwood, TN.					
Inherited IRA ⇒ Fidelity Advisor Growth Opportunities [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Inherited IRA ⇒ Fidelity Advisor Series II (FAIGX) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Intel Corporation (INTC) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
International Business Machines Corporation (IBM) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
IRA ⇒ Berkshire Hathaway Inc. (BRK.A) [ST]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Coca-Cola Company (KO) [ST]		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
IRA ⇒ General Electric Company (GE) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Hewlett-Packard Company (HPQ) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ HP Inc. (HPQ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
IRA ⇒ Lennox International, Inc. (LII) [ST]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Microsoft Corporation (MSFT) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Northern Trust Inst Govt Portfolio [EF]		\$500,001 - \$1,000,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ QUALCOMM Incorporated (QCOM) [ST]		\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
IRA ⇒ SunTrust Banks, Inc. (STI) [ST]		\$50,001 - \$100,000	Tax-Deferred	None	<input type="checkbox"/>
IRA ⇒ Virtus Investment Partners, Inc. (VRTS) [ST]		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
IRA ⇒ Wells Fargo & Company (WFC) [ST]		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IRA ⇒ Wells Fargo Bank Deposit Accounts [BA]		\$250,001 - \$500,000	Tax-Deferred	None	<input type="checkbox"/>
Neuberger Berman Real Estate Securities Income Fund, Inc. Neuberger Berman Real Estate Securities In [MF]		None	None		<input type="checkbox"/>
DESCRIPTION: Asset belongs to son who is no longer a dependent.					
Northwestern Mutual "Adjustable Comp Life" Policy [WU]		\$250,001 - \$500,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Dividend used to increase value of asset.					
Park Center Partnership I [RP]		\$1,000,001 - \$5,000,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Brentwood, TN, US DESCRIPTION: 7% ownership interest in Heritage at Brentwood retirement community					
Park Center Partnership II [RP]		\$1,000,001 - \$5,000,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Brentwood, TN, US DESCRIPTION: 7% ownership interest in Heritage at Brentwood retirement community					
PLC Properties Partnership, 10% Interest [OL]		\$500,001 - \$1,000,000	Partnership Income	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Brentwood, TN, US DESCRIPTION: Warehouse on Highway 31, Orlanda, TN; Maryland Commons LLC, Brentwood, TN, and Harpeth Green Properties, Brentwood, TN. Gross value of asset listed; filer owns 10% interest therein.					
Procter & Gamble Company (PG) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
State Bank Financial Corporation. (STBZ) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SunTrust Bank Accounts [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
Thoma Cressey Friends Fund VII LP ⇒ Spine Wave, Inc. [HE]		None	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: December 2018 valuation of this investment concluded the FMV was \$0.					
Thoma Cressey Friends Fund VII LP ⇒ The Attachmate Group (formerly, Wizard Parent LLC) [HE]		None	None		<input checked="" type="checkbox"/>
Wells Fargo Bank Deposit Accounts [BA]		\$250,001 -	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
		\$500,000			

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Thoma Cressey Friends Fund VII LP ⇒ The Attachmate Group [HN]		07/2/2018	S	\$50,001 - \$100,000	<input type="checkbox"/>

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Wells Fargo Inherited IRA	IRA Distribution (to spouse)	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
General Partner	PLC Properties, LLC
Member	Hamilton Fairfax, LLC
Partner	Cooper Bros. Land Company
Member	Harpeth Green Properties, LLC
Partner	Park Center Partnership I
Partner	Park Center Partnership II

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
The Aspen Institute, Inc.	03/2/2018	03/5/2018	Washington, DC - Stanford, CA - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- Annuity
- Cooper Brothers Land Co. (33% Interest)
LOCATION: Brentwood, TN, US
DESCRIPTION: Asset values listed for properties held in the Cooper Brothers Land Co. reflect filer's 33% portion of the total asset value.
- Inherited IRA
- IRA
- Thoma Cressey Friends Fund VII LP

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Hon. Jim Cooper , 06/12/2019